Appendix E Nlaka'pamux – HVC Employment Database User Manual

User Manual Version 1.0 May 15, 2012

This manual will guide you through the use of the program. Prepared by Nesoo Watchie Resource Management Ltd. on behalf of the Nlaka'pamux Participatory Bands

Purpose

The purpose of the Nlaka'pamux-HVC Employment Database is to capture, store and report out on standardized Nlaka'pamux participatory bands' membership information on current education, skills and education levels and needs, barriers to employment in HVC, and interests in gaining employment at HVC by individuals, contractors and entrepreneurs. The information to be entered into the Database comes from the Skill Assessment Form.

Accessing the Nlaka'pamux-HVC Employment Database

To start the Access program, click on the NWRM shortcut icon on your desktop.

Splash Screen

On pressing the shortcut, you will be presented with the Splash screen. At the center of the screen is the version and date of the program you are running. As the Splash screen opens it checks the computer environment before the Access program starts. If the environment is correct then you simply press the **Start the Program** button and the program will start.

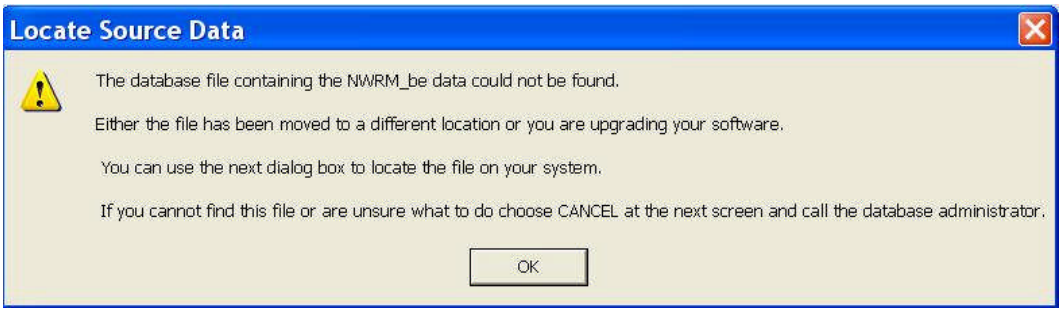
If a problem is encountered then you will be prompted to take action. The most common problems are an incorrect version of the program or the database cannot be found.

Incorrect Version of Program

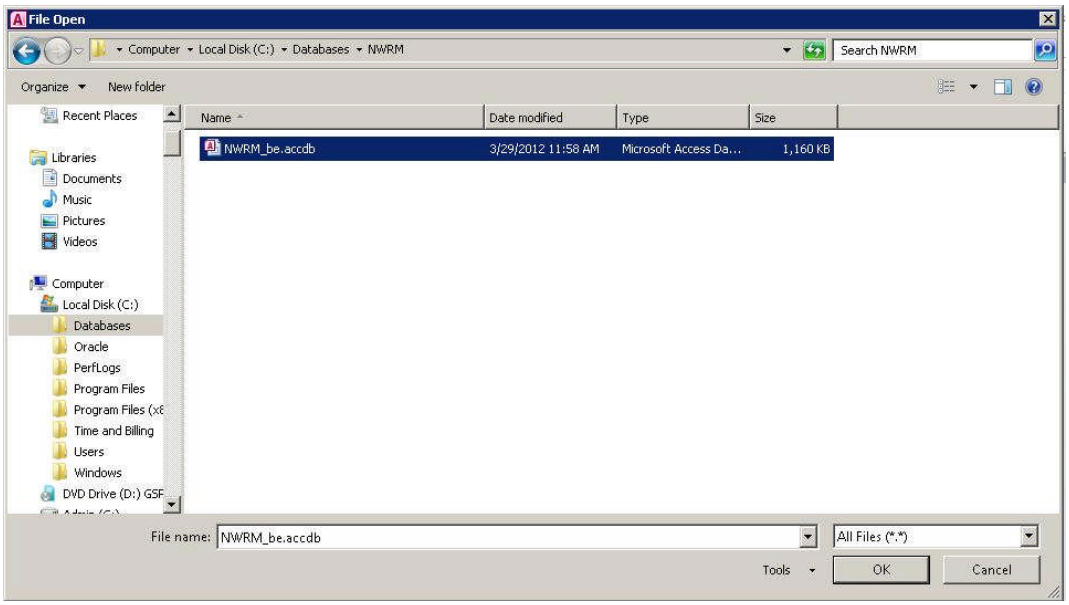
You will be presented with a message instructing you to either replace the new program or consult someone to install the new program for you. See installing the program for more details.

Database Cannot be Found.

If the program cannot find the actual data that is in the backend database then it will open this message.


Locate Source Data
The database file containing the NWRM_be data could not be found.
Either the file has been moved to a different location or you are upgrading your software.
You can use the next dialog box to locate the file on your system.
If you cannot find this file or are unsure what to do choose CANCEL at the next screen and call the database administrator.
OK

After you press the **OK** button, a browse window will open.



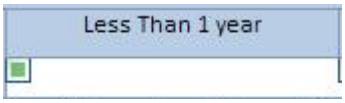
Navigate to the location of the backend database (note the name of the file below). If you do not know where the backend database is located then contact your system person or someone who knows. The recommended folder with the database file name is {Drive}:\databases\nwrm\nwrm_be.accdb where [Drive] is the server drive name. Once you locate the backend database, select the backend database, click OK and your program will link with the data. This may take a few minutes. Once it is linked, you will be able to proceed. The program will remember the location of the database for the next time you start it.

Upon pressing the **Start Program** button you will be presented with the main screen of the program called the Data Entry Screen. From here you will encounter a number of screens for the management of the data. Each of the screens performs a specific function. Within each screen there are a number of consistent features allowing for navigation within the program. These features include:

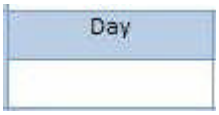
1. Titles and Labels
   These will appear on the screens using a blue background colour. They are for explanation purposes only. You cannot enter data into these items.

2. Data Entry Cells
   These cells allow for entry of data, they can enter data into any one of the following:

   a. Check Boxes
      These are used for true /false or yes/no questions. You simply click the box to toggle between them. A Check in the box indicates the positive answer like true or yes.



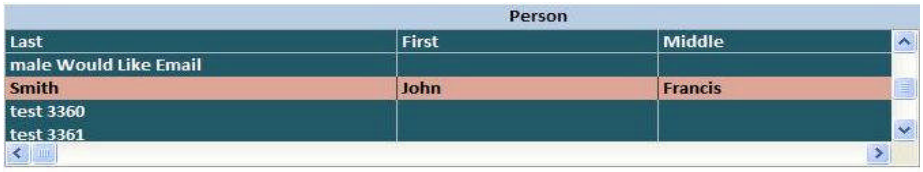
   b. Text Boxes
      You can type in these cells. They are used for capturing text information. Some of the text boxes will limit how many characters can be entered (numbers, alphabet, or special characters like "?" mark).



   c. Memo Fields
      Like text fields, they allow for entry of all characters, but, have no limit as to how much can be typed in.

3. List Boxes

   List boxes display more than one row of data that has been entered. You can click on any of the visible lines to select them. You can also use the up, down, page up and page down arrow keys to move through the list. You cannot enter or type directly into a list box. You need to use buttons located next to the list box to change or add to the list.



4. Drop Down Boxes

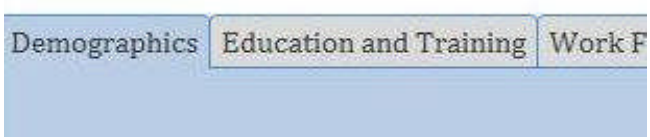
   Like a list box, they display previously entered data but only one row is visible. In some cases you can enter directly into a drop down box. By clicking on the arrow on the right of the drop down box you will get a list from which you can select the value that you want. You can also type in the cell and it will display the first value with that character as its lead character, allowing you to select that value or choose another by continuing to type or select from the drop down list.

5. Buttons

   These are used to navigate to different areas of the program or signal to the computer that you want to do something.

6. Tabs

   Tabs appear on the main screens (typically at the top) and allow you to navigate to new information. Unlike buttons, they do not move you away from the screen you are looking at, they just display different information.

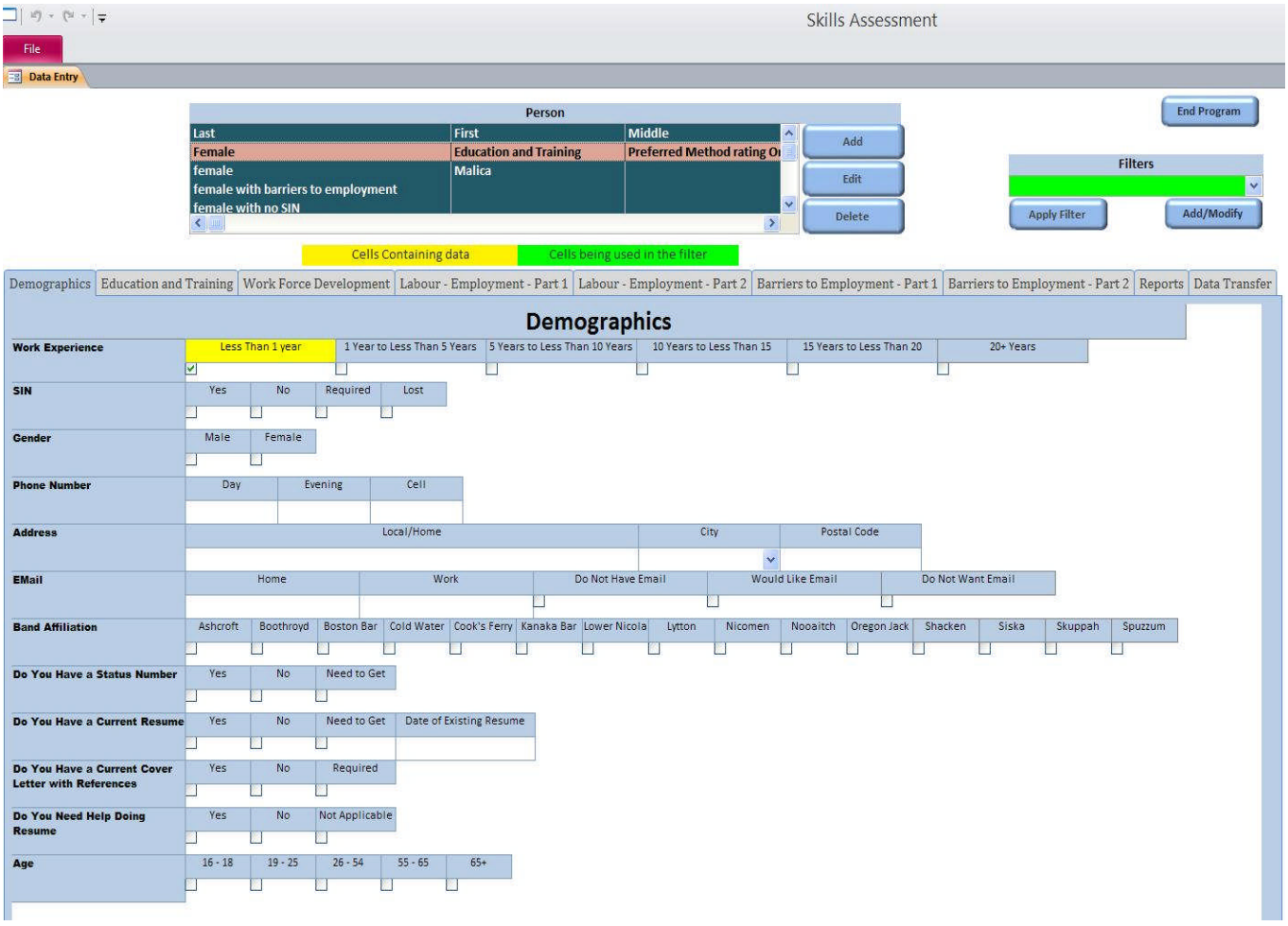


These features will allow you to maneuver within, enter data into, query data and report out the data from the various program screens: Data Entry Screen; Person Screen; Filter Screen; and the Report Screen.

Data Entry Screen

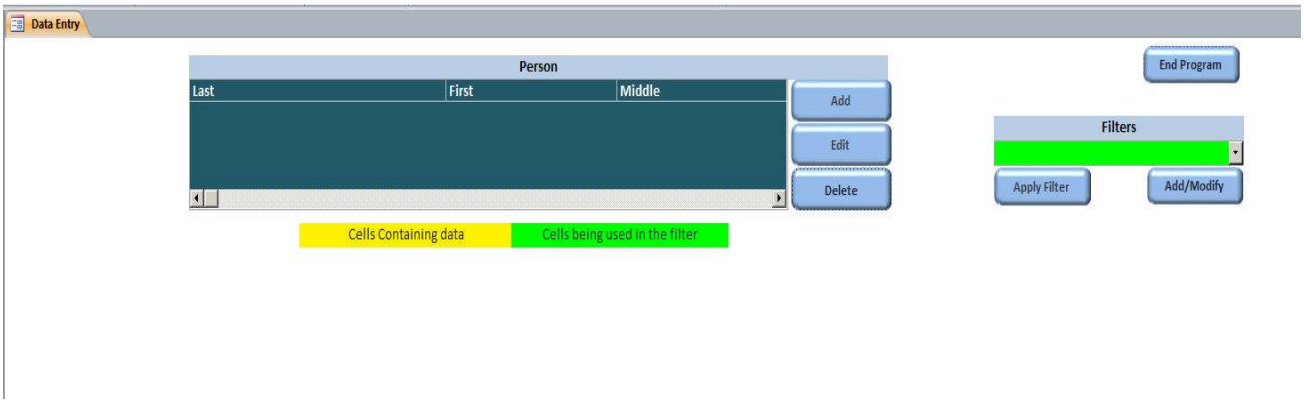
This is the main screen of the program which allows you to enter or navigate to other parts of the program. All the information being tracked is accessible from this screen. You can select people, add people, edit peoples' names and delete people from this screen. You can add or modify the skills information for each person. You can access reports, export and import information from other Data Entry Locations. You can create and apply filters that limit the data you are looking at.

Since the program is focused around people, at the top of the screen is a Person List Box which will display people already entered or be blank. The screen will look like this if people have already been added:

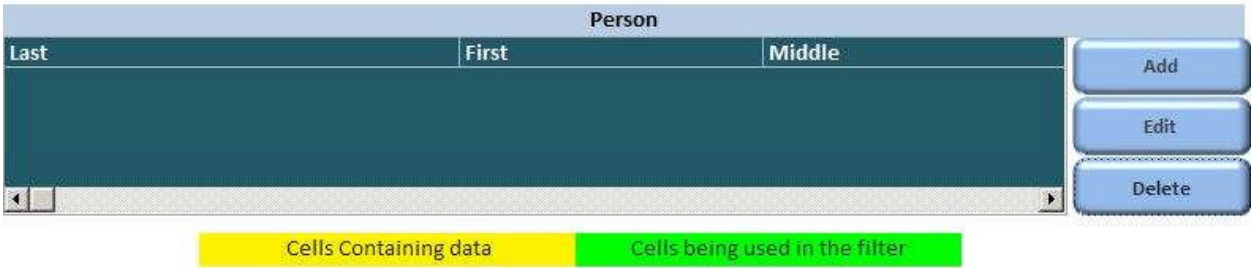


If you want to update data for an existing person then see the section in this manual on Entering Information for a Person.

The screen will look like this if no people have been added:

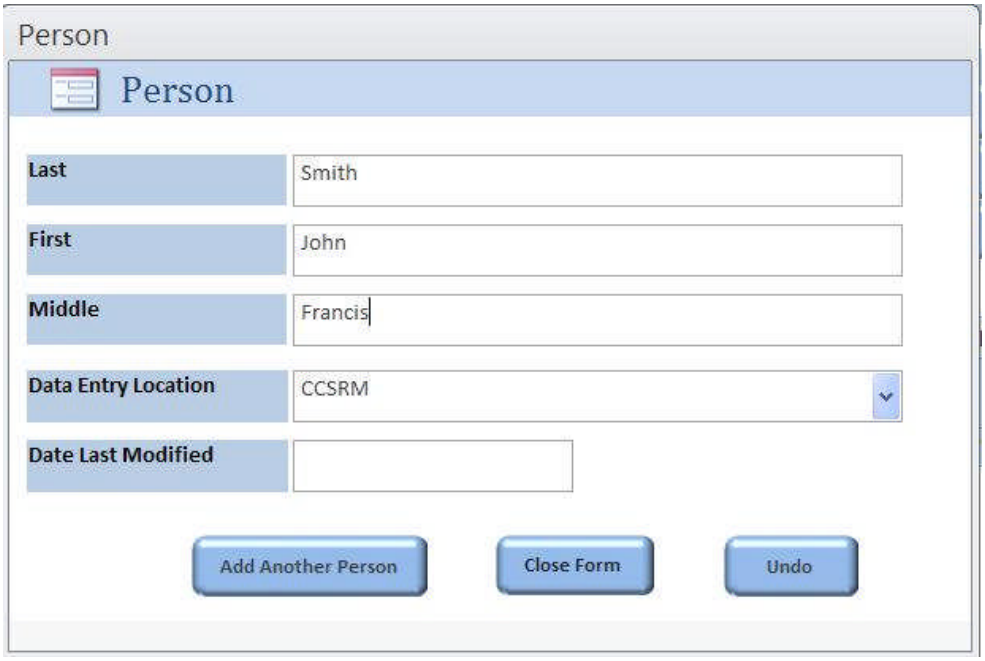


To add a person to the list Press the **Add** button. The Person Screen will open.



Person Screen

The Person screen allows you to create people by using their first, middle and last names and assigning them to a data Entry Location.



Enter the person's names: Last; First; and Middle. The Last and First names are mandatory. No two full names (Last + First + Middle) can be the same in the system, therefore, it is recommended to enter all three names if available.

The Data Entry Location will be blank the first time the program is used. Enter the Data Entry Location. Once a value is entered the program will automatically enter this value for you. Care must be taken in entering the Data Entry Location as any spelling change from what was previously entered will denote a new Data Entry Location. For the most part only one value needs to be entered so accepting the default is the preferred approach.

The program will insert the Date Last Modified date for you.

Once this screen is open, it must be closed before you can do anything else. If you are finished in this screen, press the **Close Form**.

If you have more people to add, once the fields are filled in, press the **Add Another Person** button to add more people.

Performing any of these actions causes the program to check to see if you already have a person with that name. If you do, the program will give you a message asking you to modify the name so it is unique. You can use the **Undo** button to remove any changes you made.

Pressing the **Close Form** button will return you to the Data Entry Screen. The last person you entered will be highlighted in the Person List Box at the top center of the Data Entry Screen. You can now enter information for that person or select another person from the list.

Modifying a Person's Name

If you need to change the spelling of a person's name, highlight the name you wish to change on the Data Entry screen and press the **Edit** button. You will be taken to the Person Screen where you can then edit the name. If you wish to edit another name you must first press **Close Form** to close the Person Screen and select the next person.

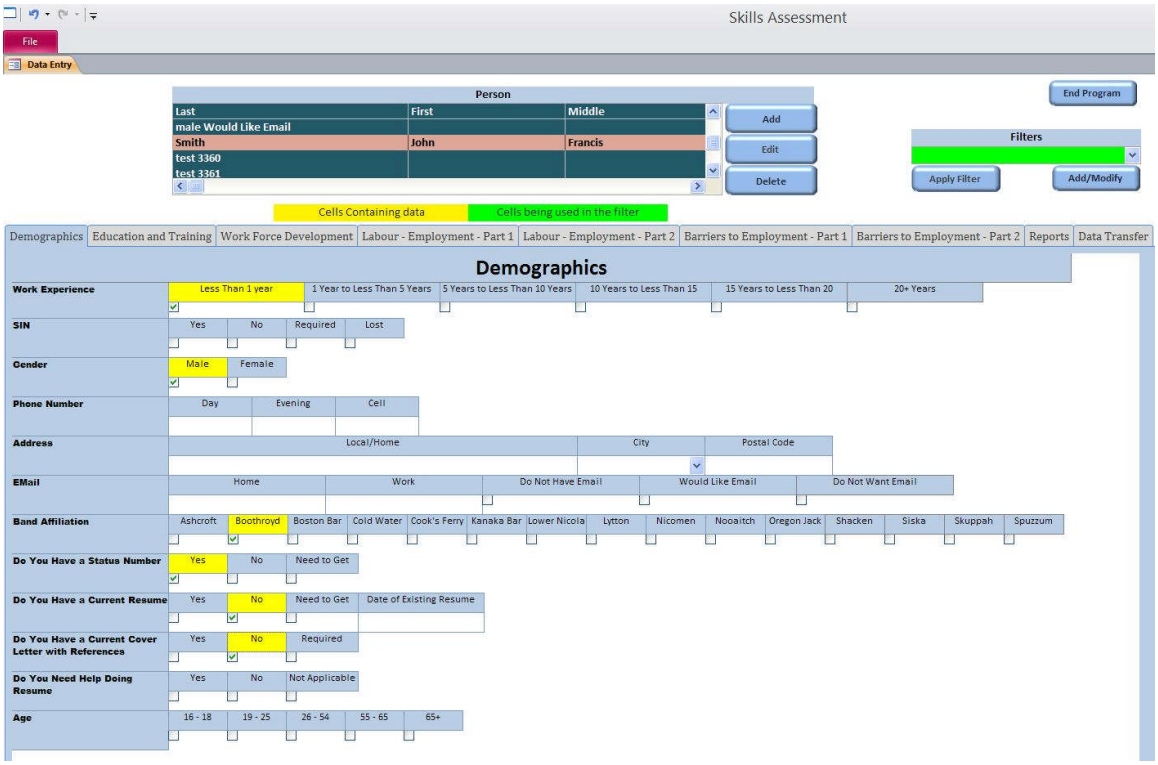
Delete a Person from the Database

If you want to remove or delete a person from the list, highlight the person and press the **Delete** button. You will be prompted with the name of the person that the program will delete. You must press the **Yes** button if you want to continue. Once you press the Yes button you cannot retrieve the person again. You would have to re-enter the entire person's information. Press No if you want to cancel the delete.

Deleting a person not only removes the person from the list but also removes any of the information ever entered for that person.

Entering Information for a Person

Highlight the person of interest in the Person List Box at the top center of the Data Entry Screen.

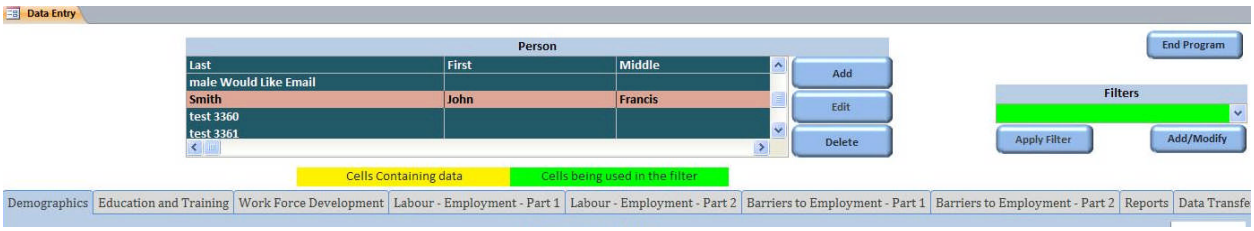


Below the Person List Box are a number of Tabs showing the Information items being tracked for the Person you highlighted. The first tab is the Demographics tab which is the default when the screen first opens and it will be coloured blue indicating that it is currently active. The other tabs will be grey. You will also see a Title called Demographics. On the far left of the Demographics screen is a list of Question Labels shown in blue.

The first question on this tab is Work Experience. To the right of the Work Experience label are the possible answers to this question from the Skills Assessment Form. The possible answers are toggle boxes so you simply click in the appropriate box. Once you click the box the label will change to yellow. The yellow indicates where answers have been provided. If you decide you answered incorrectly you can select another answer by clicking in another box. This new box will change to yellow and remove the check where you first clicked, changing that box back to blue. This happens because there is only one answer allowed for this question.

Proceed down the list of questions providing answers where applicable. In some cases you will be allowed to have more than one answer to the question. For example, the Address question allows for input of Street, City and Postal Code.

When you have completed answering the questions on this tab then click the next tab Education and Training and enter the data as required. You would repeat these actions for each of the tabs.



The last **information tab** is the Barriers to Employment – Part 2. When you have completed entering the information in this tab then select another person from the Person List or Press the **End Program** button to close the program.

Filter Screen

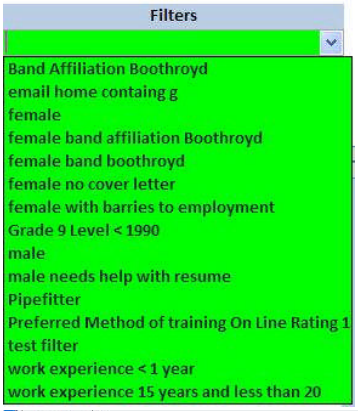
To the right of the Person List Box, on the far right above the tabs, there is a special section called Filters. There is a lot of data being tracked for each person and there is a need to quickly identify those people that have certain data entered. Filters allow to you specify information found in the database. You can specify any information found in the database and use it to identify people that have those data entry items. An example of this would be those people that need help preparing a resume. The filter section allows you to create filters to find people that match your request.

Filter Details

The Filter Screen also allows you to add new filters. The filter details screen allows you to specify the data items to be used in the filter. Once a filter has been created, it will be stored in the program. The filter detail screen allows for adding new filters, modifying existing filters and deleting no longer needed filters.

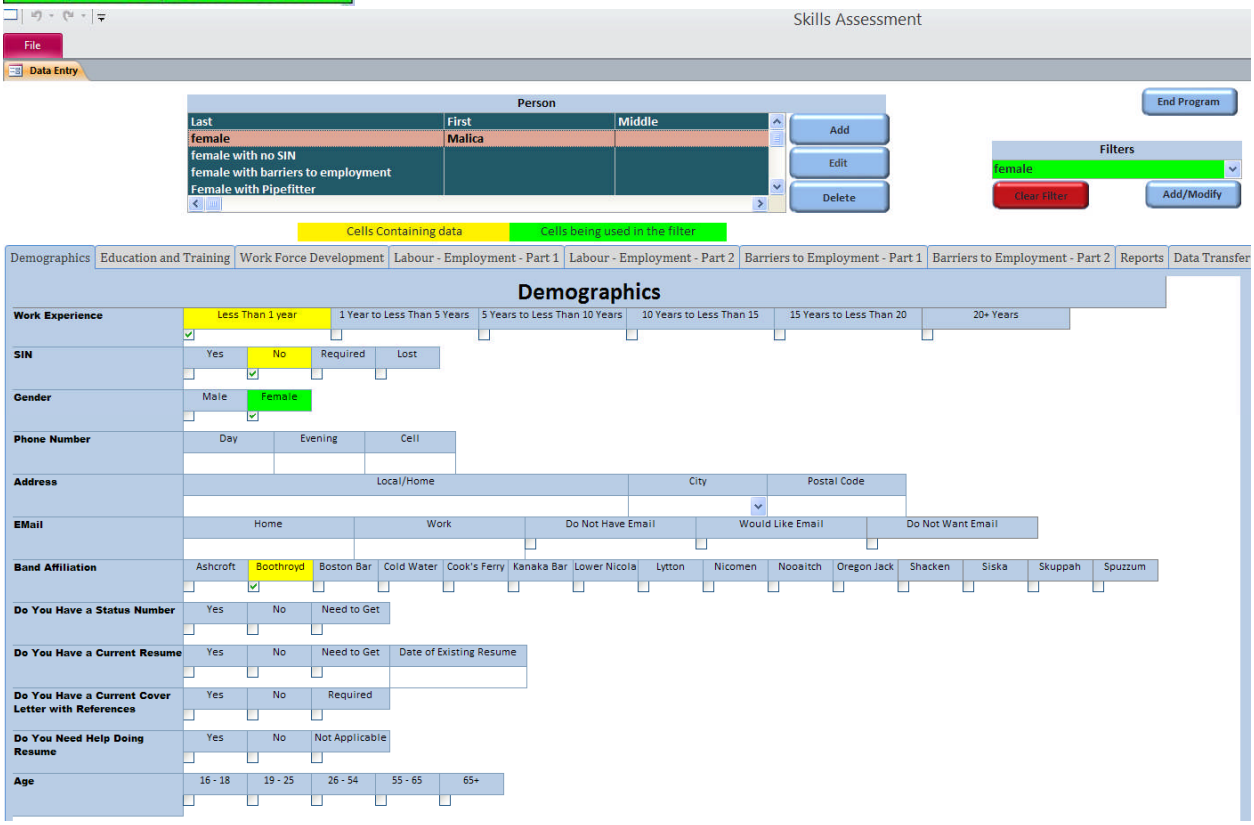
Applying a Filter

In the Filter Box, a drop down box with a heading of filter allows you to select previously created filters. A filter consists of a name and date last modified. You can select an existing filter by choosing it from the list shown in the drop down.



If you see an existing filter you want in the drop down list then select it and press the **Apply Filter** button. The apply filter button will turn red indicating it is applied. The Person List Box will change showing you only the names of the people that meet the filter criteria.

Any information item considered by the filter will have a heading in green. If there aren't any people that match the filter criteria then you will get a message box indicating so.

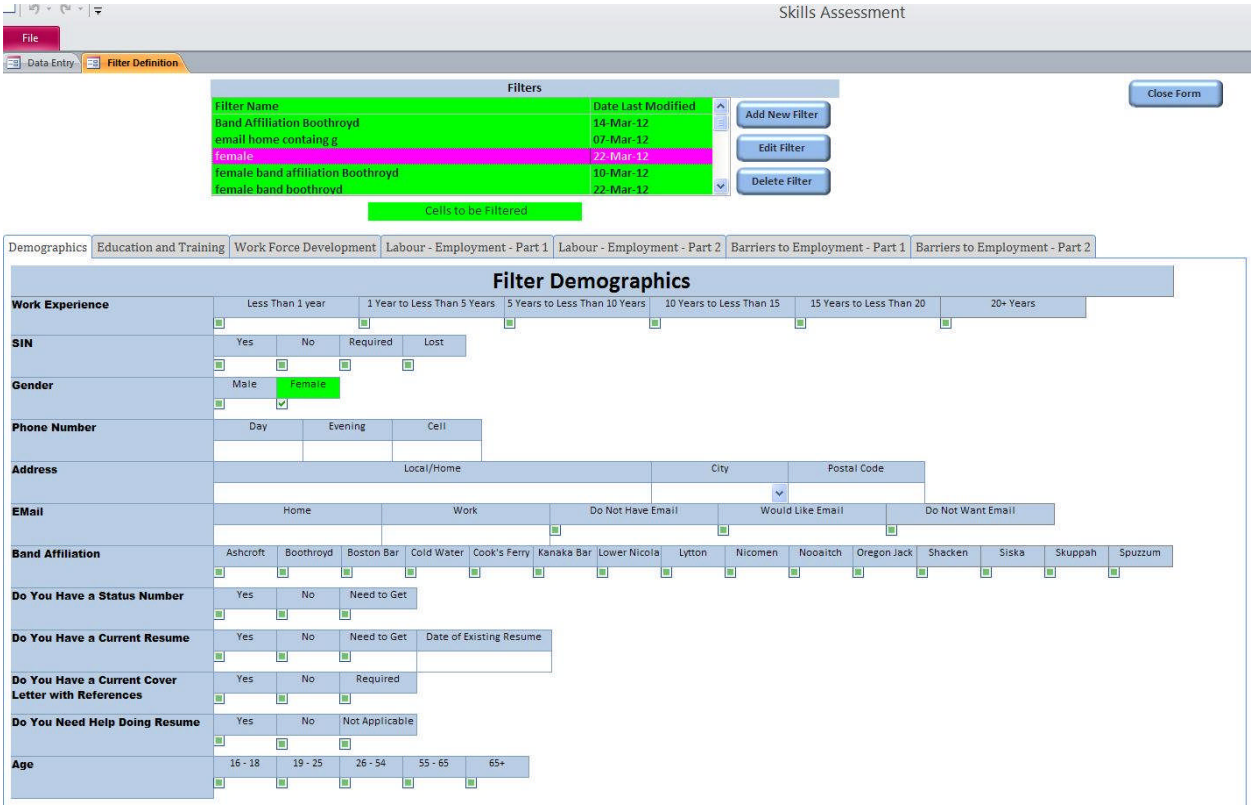


See the Add/Modify a Filter section to understand how a Person is matched to a Filter criteria. The screen above shows the Filter Name 'Female' being selected. When applied, this filter finds all the people that have answered the Demographics question Gender as Female. You will notice that the Female data label is coloured green indicating that it is being filtered. The unfiltered data cells are still coloured yellow indicating where data has been entered for this person.

Add/Modify a Filter

If you want to see how a filter is defined or create a new filter then Press the **Add/Modify** button.

This button will bring up the following screen:



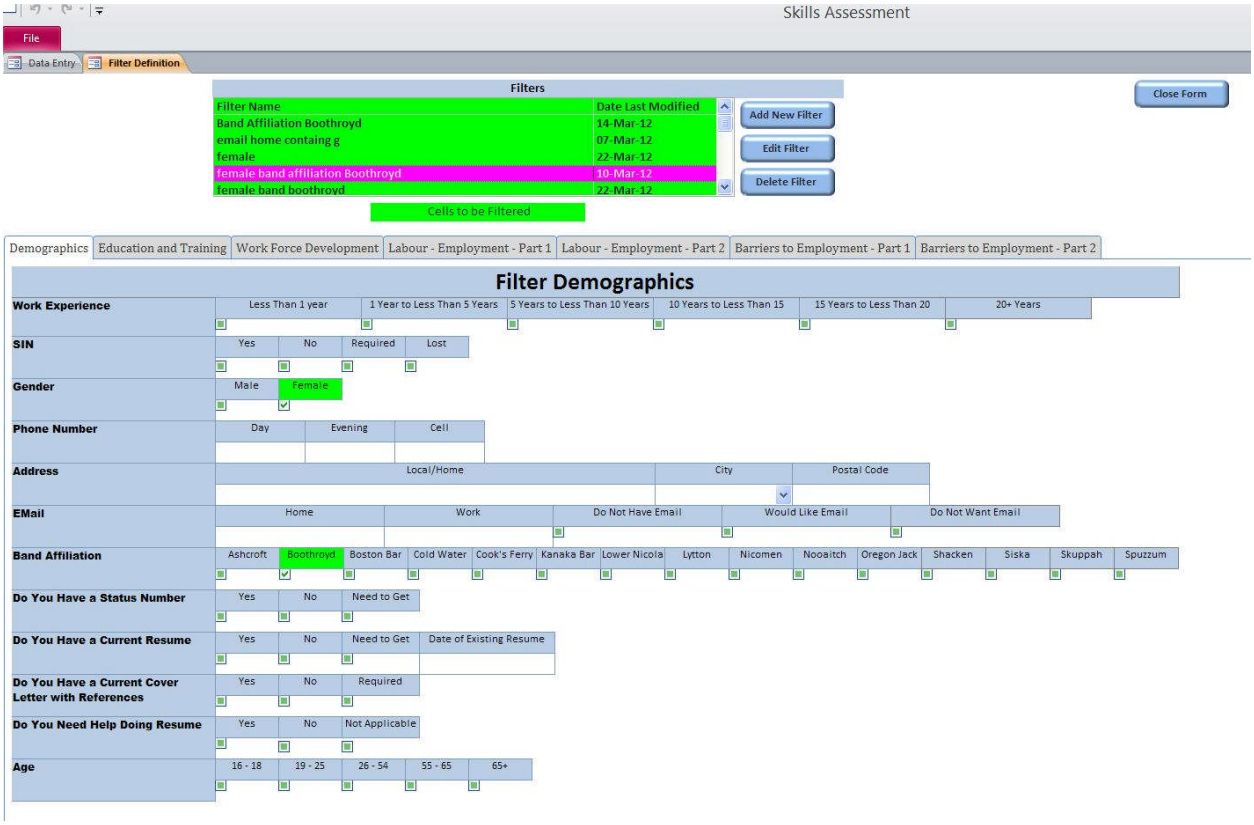
At the center top of the screen is a list of filters that exist in the program. The Female filter shown in our example is highlighted purple. Below the Filter list are the information tabs beginning with Demographics. You will notice that the Female data cell is coloured green while data cells not contributing to the filter are shown in blue. When the **Add/Modify** a filter button has been selected, these Information tabs are not used for entering data for a person but instead are used for defining the filter.

You can modify this Female filter by entering values in any of the data cells on any of the information tabs. Care must be taken to ensure that the Filter name describes what the filter is considering. For example, it would create confusion if you called the Filter Female but clicked both the male and female data entry cells. When this filter is applied it would bring up both male and female people, which is not what the filter name implies.

If multiple answers are given to a specific question (Gender in this example), the Filter considers these as an EITHER/OR response. Our example is either female or male if both data cells are clicked. The filter will choose people that have either of these answers. There are only two possible answers for this question so the program would return everyone unless the person did not answer the question. These people would be dropped by the filter.

When choosing data entry cells to filter you must consider the Question which is listed at the far left of each Information tab. Choosing more than one value for the same question will result in this EITHER/OR case.

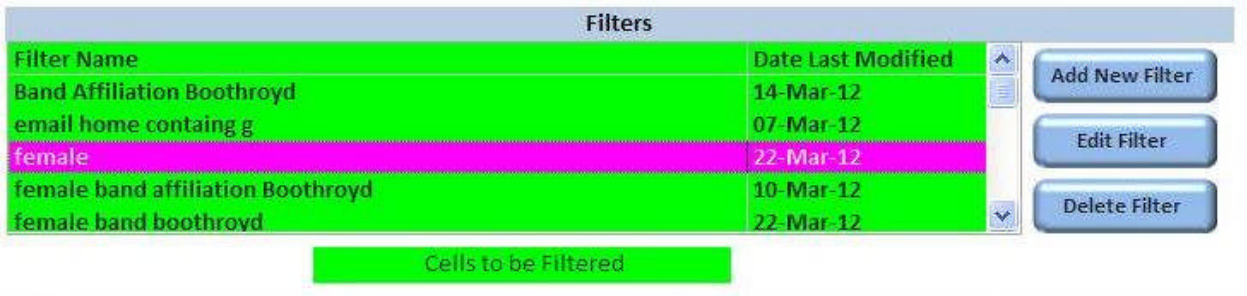
Entering values from different questions results in an AND case. This means that the person must meet the data values for both questions.



This filter has values for two questions; Gender and Band Affiliation. If this filter is applied then females that belong to the Boothroyd band would be found.

It is not recommended to make very complicated filters by considering many questions at the same time, although this is possible.

You can view other Filters by selecting them in the Filter List, and press the **Close Form** button if you are finished or create a new Filter by pressing the **Add New Filter** button.



Add New Filter

Pressing the **Add New Filter** button will open the Filter Screen.

Enter the name for your new filter. In naming filters, it is best to name it so it is clear what is being filtered. As a general rule, if it is difficult to provide a name for the filter then the filter is probably too complex. You do not need to provide a value for the Last date Modified as this will be filled in automatically for you. Press the **Add Another Filter** or the **Close Form** button if you are finished. You may get a message saying that the name you provided has already been used. In this case modify the name accordingly. Once the Filter Screen is closed, select the existing Filter name and click Add/Modify. Select the values that define your Filter then click the **Close Form** button.

Editing a Filter Name

If you want to change the name of a filter then use the **Edit Filter** button. Highlight the Filter you want to edit and press the **Edit Filter** Button. The Filter Screen will open allowing you to modify the name. You must close the Filter Screen by clicking the **Close Form** button if you want to edit another filter name.

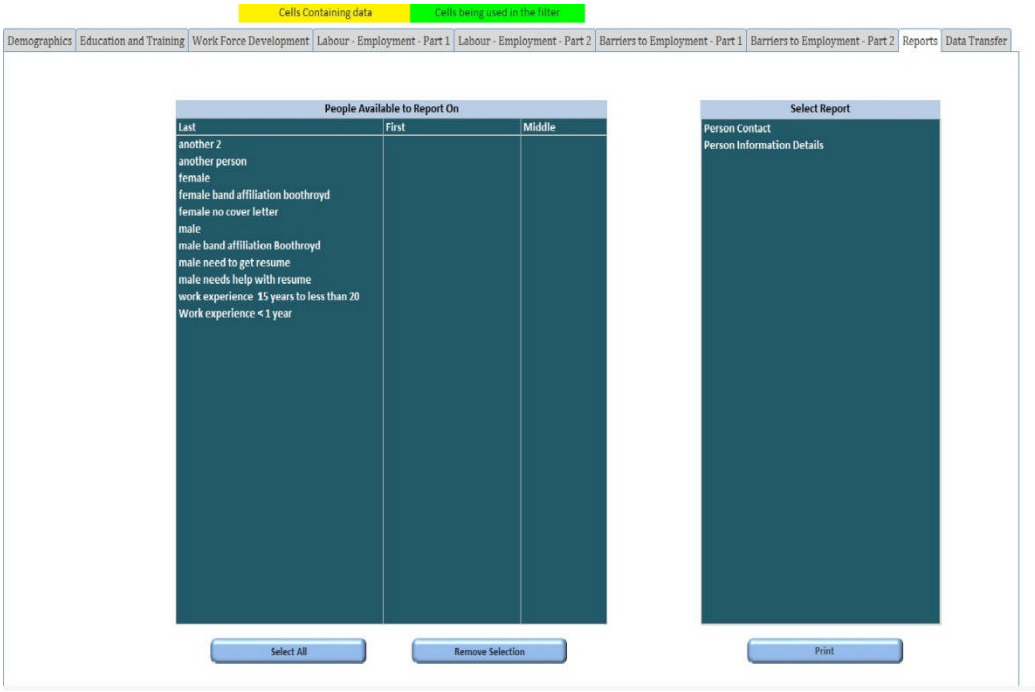
Deleting a Filter

If you no longer require the Filter then highlight the Filter and Press **Delete Filter**. You will be prompted to confirm that you want to delete the filter. Responding "Yes" to the question deletes the filter.

Report Screen

To access the Report Screen click the information tab labeled Report on the right of the Data Entry Screen.

The Report Screen provides of a list of People Available to Report On and a list of under Select Reports. It looks like this:



The list of People Available to Report On will be the same list as displayed in the Person List Box. This list is filtered based on whether a filter is applied. This list is unique in that the user can select a number of people in the list, unlike the Person List Box list, which only allows one. Once the user selects the people they want to report on, they select the report and then the **Print** button to generate the report.

Only people selected in the People Available to Report On list will be used in the reports.

There are four reports currently built in the program:

Person Contact Report

This report will show the Last Name, First Name, Middle Name, Work Phone, Home Phone, Address, City, Postal Code, Work Email and Home Email.

Person Information Details Report

This report will show all the information items for each person.

Band Statistics Report

This report counts how many times an information data entry cell has been populated. This will be summarized by Band Affiliation. This report would be limited by what band data is available.

Monthly Statistics Report

The report counts how many times an information data entry cell has been populated. This will be summarized by Month. If you select only one person then the report will show you how the data has changed for a specific person from month to month. If you apply a Band Affiliation filter and select all the people that belong to that Band affiliation then the report will show how the data changed for all people belonging to the band from month to month.

Hyperlinks

Hyperlink functionality has been added to the program. This was done for specific labels identified for the employment career path and skill development information items. The hyperlink allows users to quickly view information pertaining to each box of employment or skill development information. The hyperlink label will have an underline beneath the text indicating a hyperlink. When the user hovers over the label the cursor will change to a hand typical of hyperlink functionality. Clicking on the hyperlink will cause the program to either:

1. Display the document from the central database. A central depository is managed from the backend database which enables simple maintenance of the hyperlinks. Simple changes to this hyperlink would update all the programs in use; or

2. If there is no hyperlink defined in the backend database, then a message will be displayed saying that there is no hyperlink defined at this time.

Change Monitoring

It is important to be able to track the changes to the data from month to month. This is accomplished by creating duplicate tables for each of the Information categories and adding a month and year field. Keeping separate tables aids in performance of the database and aids in reducing the amount of program change required. When a user starts the program, the program will compare the current month to what is in the change tables. If it detects that the data needs to be added then it will copy the data from the production tables to the change tables. This only happens once each month for each back end database.

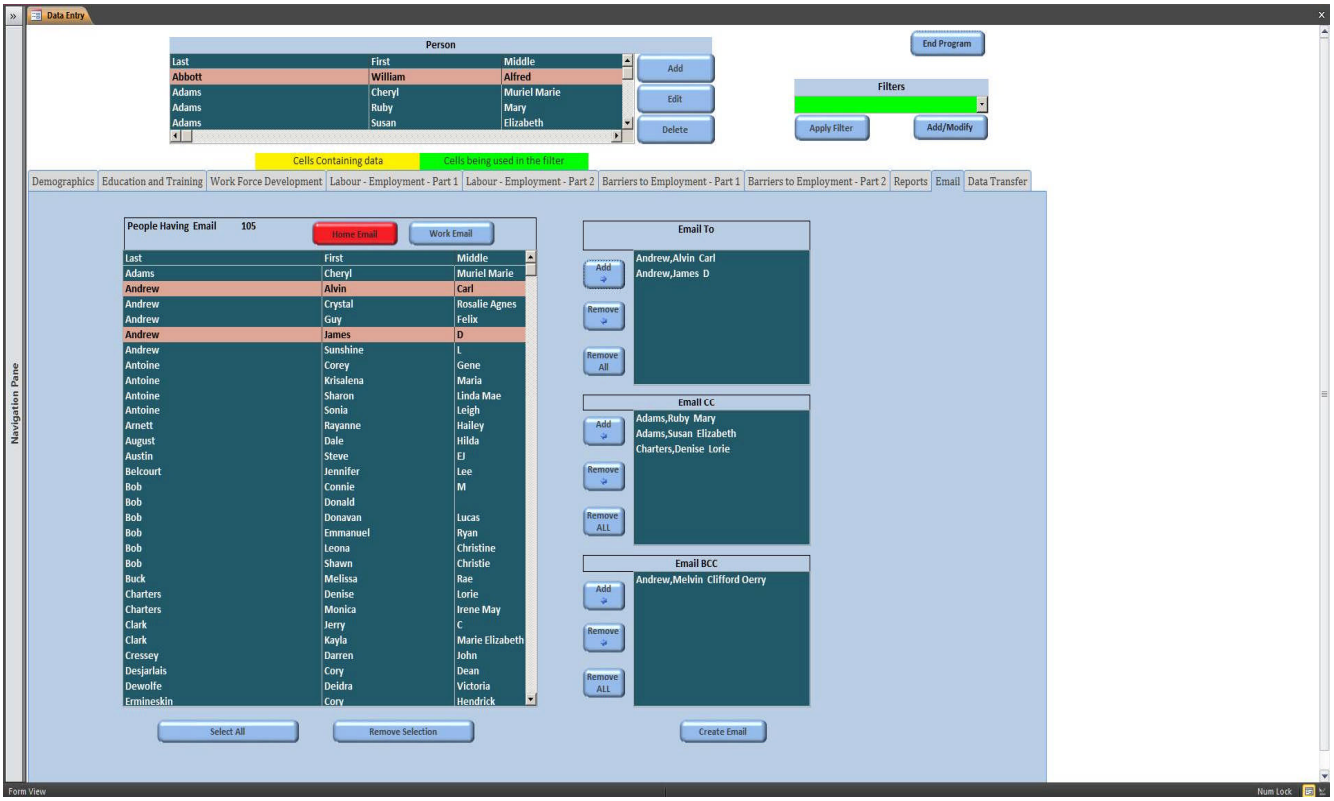
Access to data

In order to control data entry and provide specific access to data by Band, a simple text file approach has been implemented. There are four situations that include:

1. Read Access by Band;
    a. A text file with the name of the Band will allow read access to that data by that band. For example, a text file called Boothroyd will allow read access of the Boothroyd Band data by the Boothroyd band only;
2. Read access to all Band data;
    a. A text file called nwrmrd will allow read access only to all band data;
3. Read/Write Access to all Band data;
    a. A text file called nwrmwrte will allow both read and write access to all data; and
4. No Access to the Data;
    a. The absence of any of the above files will prevent access to the data.

Email Screen

A separate Email tab is located to the right of the Reports tab on the Data Entry Screen. Click the Email tab to display the Email Screen.



The Email Screen allows you to send an e-mail to anyone with e-mail information saved in the database. These e-mails will either be their home e-mails or their work e-mails or both. On the left side of the Email Screen in the People Having Email Box, click the Home Email or the Work Email to select which list you wish to work with. The names of the people having this e-mail (Home or Work) stored in the program will be displayed. Select the person or persons from this list. In the Email To box on the right of

the Email Screen, click the **Add** button to add the name(s) to your list of people you will send your e-mail to. Repeat this action for the copy ('CC') and blind copy ('BCC') selections of your e-mail.

The list of people is also impacted by the filter buttons. In the Filter Box, select the Band Coldwater filter press the **Apply Filter** button. Press the **Home Email** button, then the **Select All** button at the bottom left of the Email Screen and lastly press the **Add** button for the BCC list to add all the people from Coldwater Band having their home e-mail stored in the program to the BCC list. Press the **Create Email** button at the bottom right of the Email Screen and Outlook will open allowing you to enter a common message. Clicking send in Outlook will send an email to all Coldwater Band people while hiding the names of the others in the BCC list.

The program will not allow a person to be added twice to the list, regardless of whether they are in the 'To', 'CC', or 'BCC' lists. Additionally, you cannot send a message to both work and home email for a specific person at the same time. The program keeps your email lists until you remove them.

Data Transfer Screen

A separate Data Transfer tab is located to the right of the Email tab on the Data Entry Screen. This tab contains a button to Export Data and one to Import Data.

Pressing the **Export** button will create a comma delimited text file containing the data to transfer. The transfer data does not contain the real names of the people but substitutes the name with a system generated value. This maintains the privacy of each person. All data for each separate Data Entry location will be exported.

Pressing the **Import** button will result in a browse window for the location of the text file. Any data in the database identified by the Data Entry location in the text file will be deleted before the new data is loaded. The user will be prompted before this action takes place.